

Using SharePoint from a Mac: Instructions

This manual provides information and instructions for Mac SharePoint Users at Fermilab.

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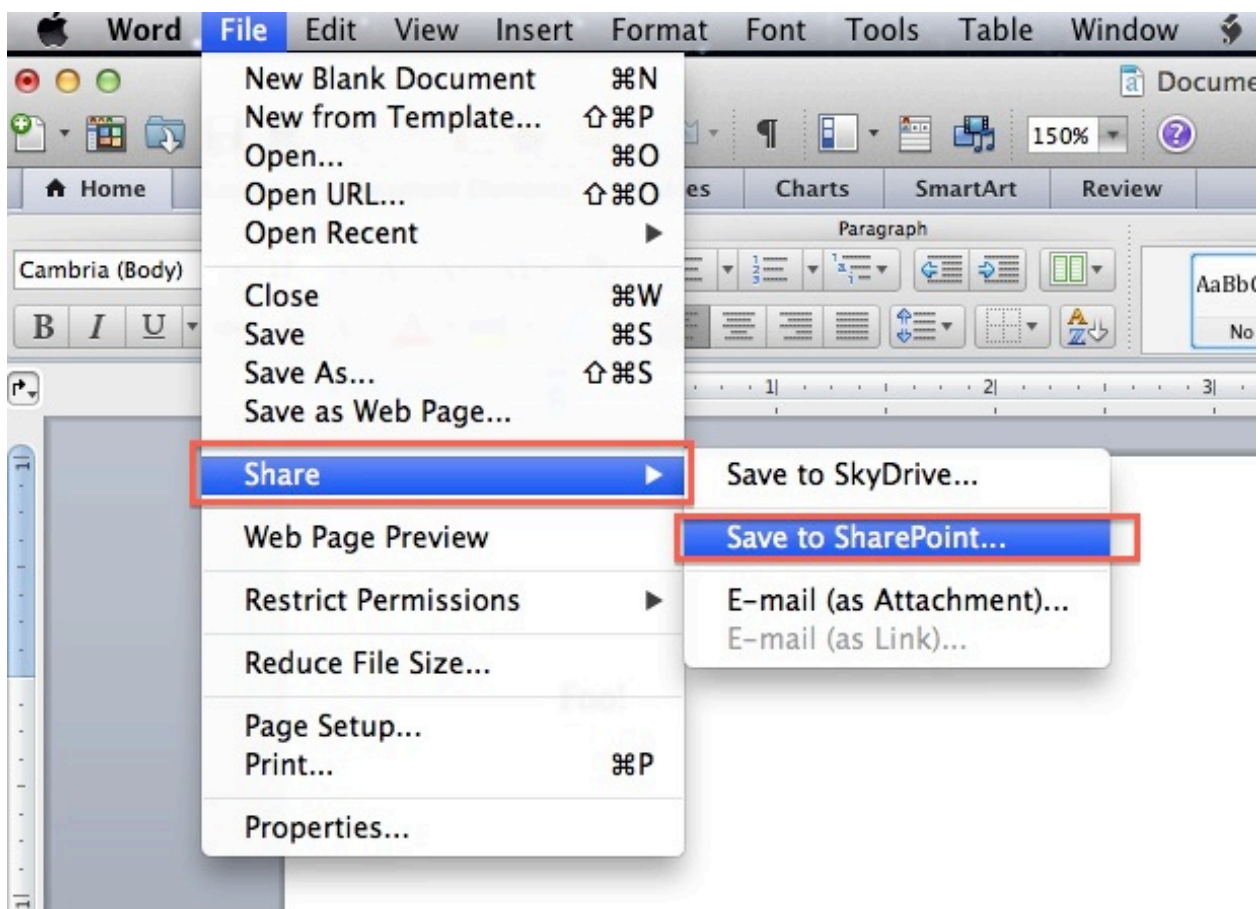
Instructions for Mac Workarounds for SharePoint

Below are instructions for Mac users for SharePoint workarounds.

Saving Office Documents

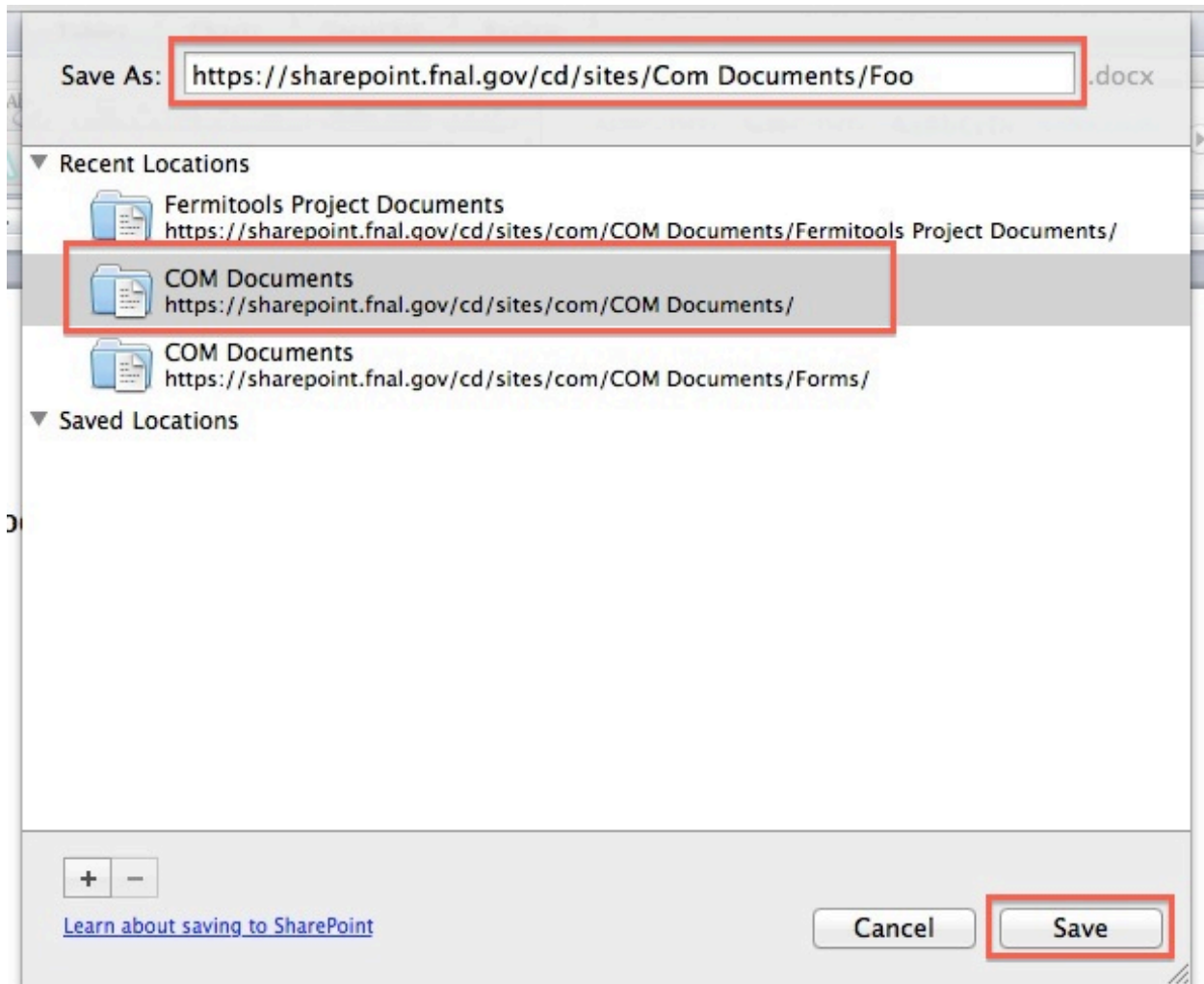
Use these instructions if you have opened an Office document from SharePoint and want to save your changes directly to that same location in SharePoint (without having to upload your document after you have saved it).

1. From the **File** menu, select **Share** and then **Save to SharePoint**.



2. When the Save to SharePoint dialog box pops up, select the desired destination in SharePoint from **Recent Places** if it is there. If you opened your document by clicking on it in SharePoint, and you have not used **File -> Save** to save the document locally, then document's SharePoint location should be in the **Recent Places** list.

If your document location is not in the **Recent Places** list, just type the SharePoint destination URL in the **Save As** text field in the dialog box instead.



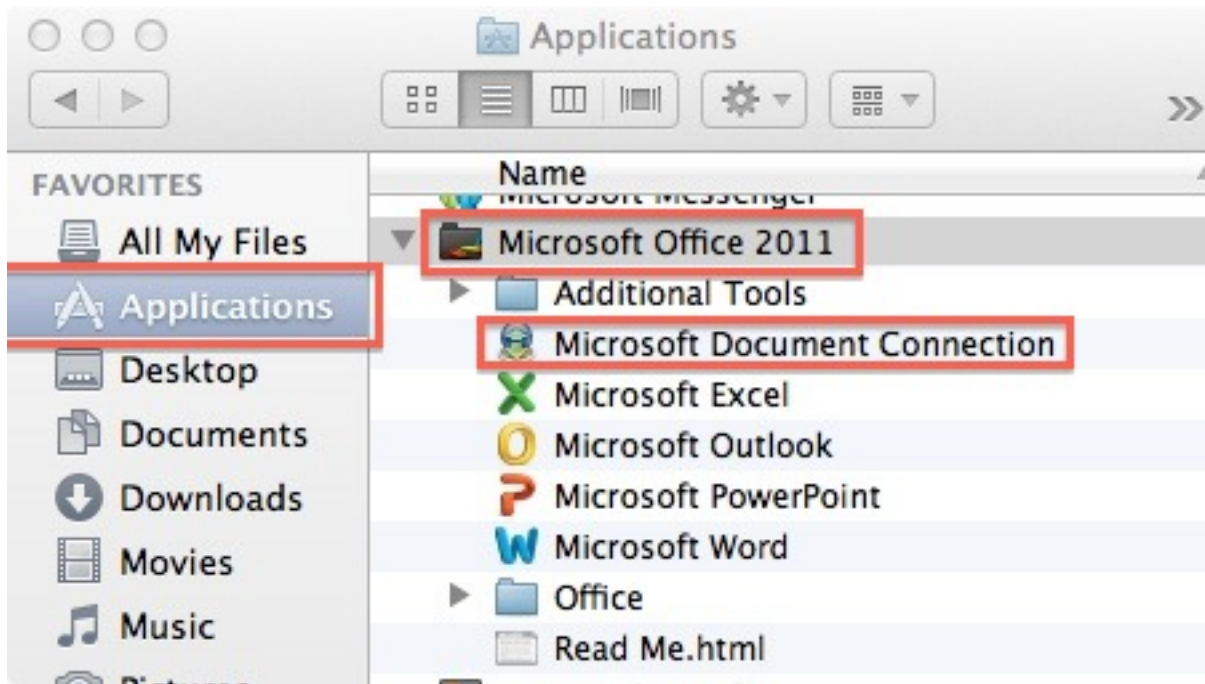
3. Finally, click on the **Save** button to save your document directly to SharePoint.

Uploading and Downloading Multiple Files Using Document Connection

Use these instructions if you want to upload or download multiple SharePoint files at once instead of one at a time. Document Connection allows you to drag-and-drop files as if the SharePoint library was a folder on your local Mac.

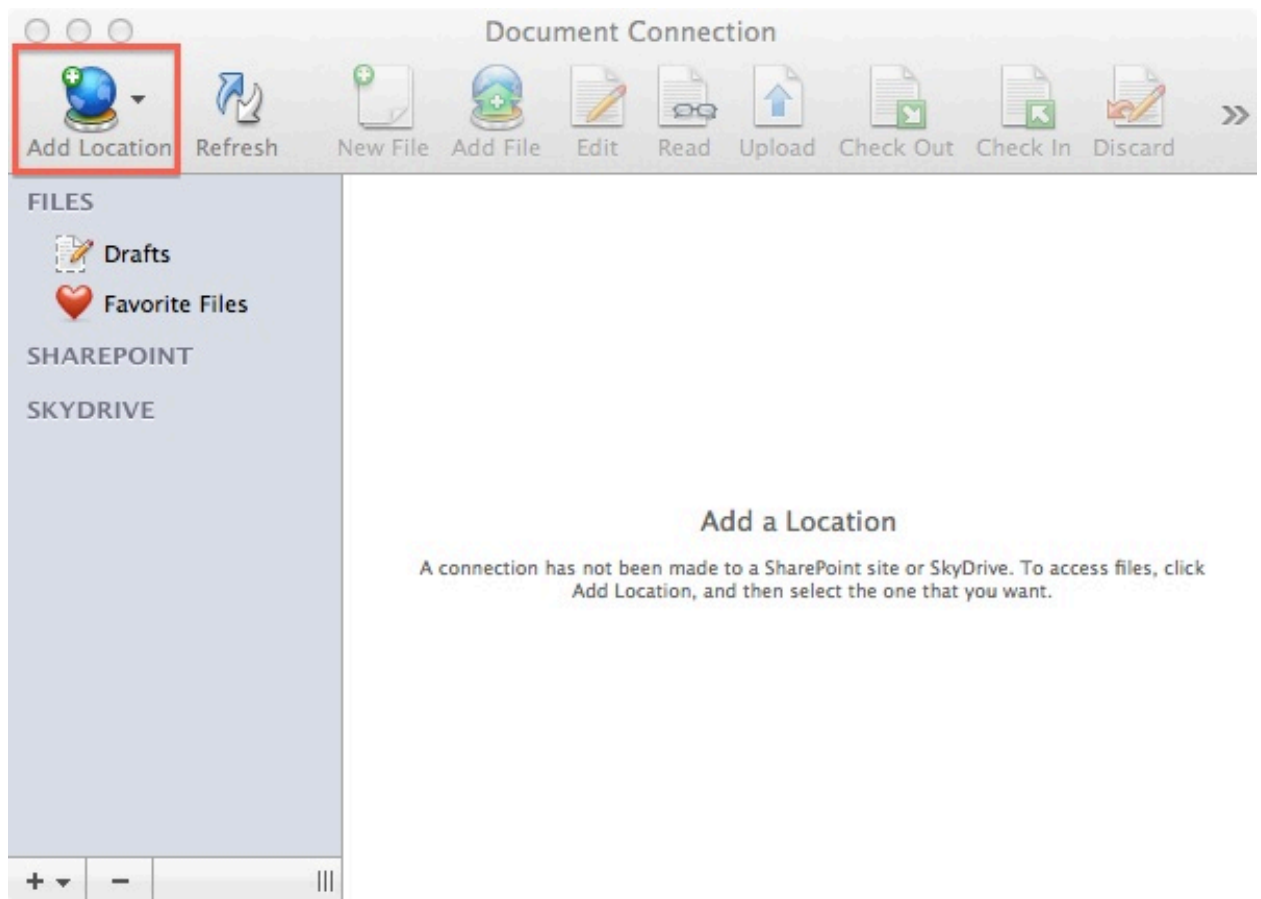
Finding and Starting Document Connection

Document Connection comes with Office 2008 SP2 or later and is in the Office folder of your applications folder. Double-click on it to start it. You can also drag it into your dock if you will be using it frequently.

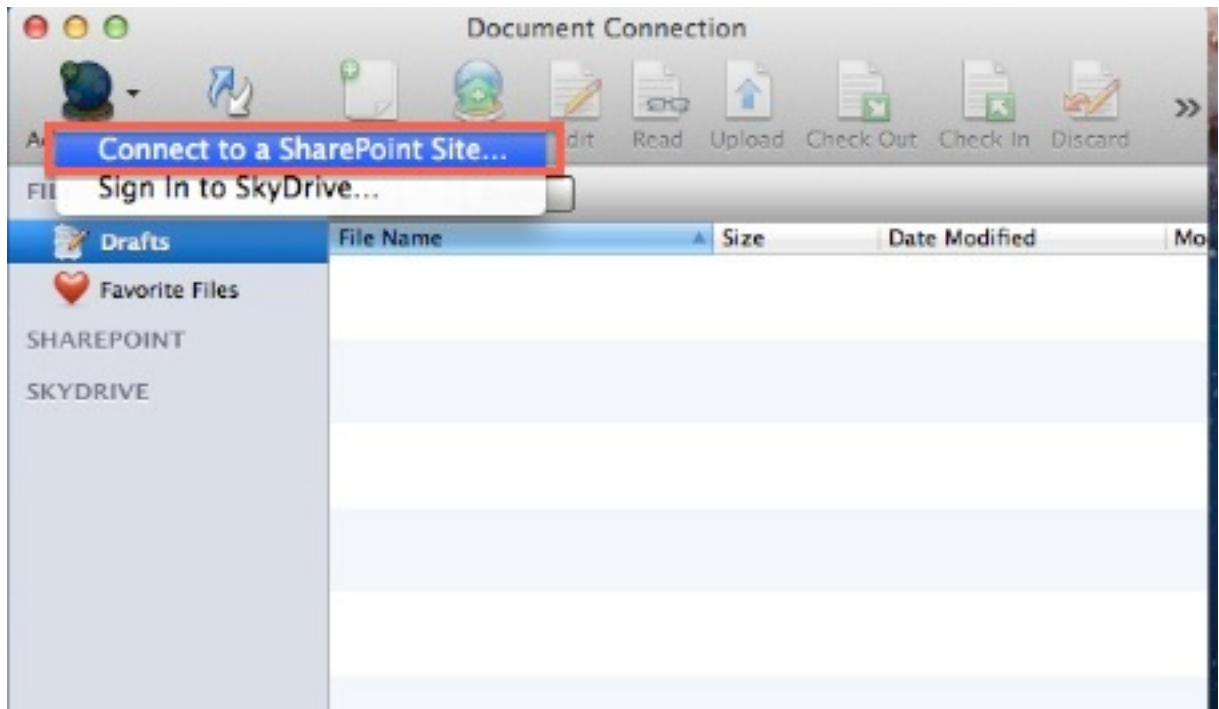


Configuring Document Connection

1. When the Document Connection window comes up, click on the **Add Location** button.

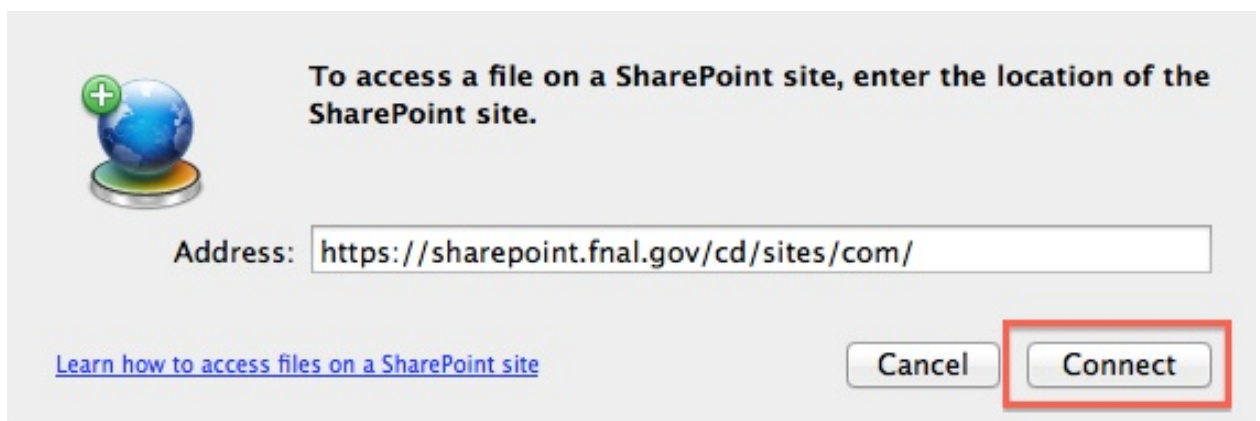


2. Select **Connect to a SharePoint Site**.

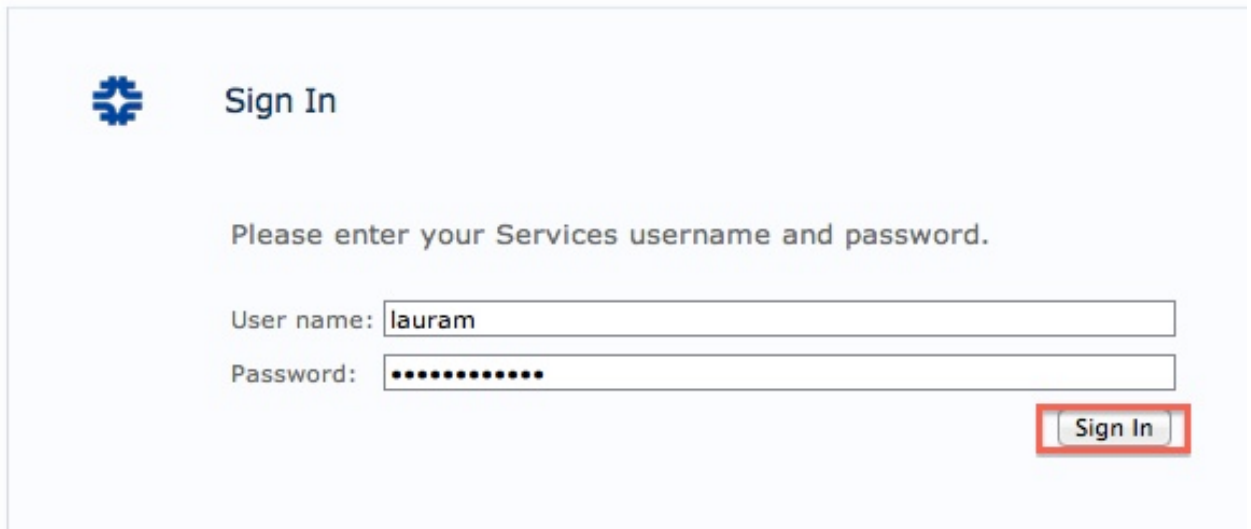



3. Put the desired SharePoint URL in the **Address** field and click on **Connect**. If you put in the URL for your site collection, you can browse as needed to any contained libraries.

(If your version shows an **Authentication** menu, you can select **Username and Password** and enter in your Services username and password and check the checkbox for **Save Password in My MacOS Keychain** if desired.)



4. Enter your Services username and password and click **Sign In** if a password dialog box comes up.

A screenshot of a 'Sign In' dialog box. At the top left is a blue gear icon. To its right is the text 'Sign In'. Below this is the instruction 'Please enter your Services username and password.' There are two input fields: 'User name:' with the text 'lauram' and 'Password:' with a series of dots. A 'Sign In' button is located at the bottom right, highlighted with a red rectangular border.

 **Sign In**

Please enter your Services username and password.

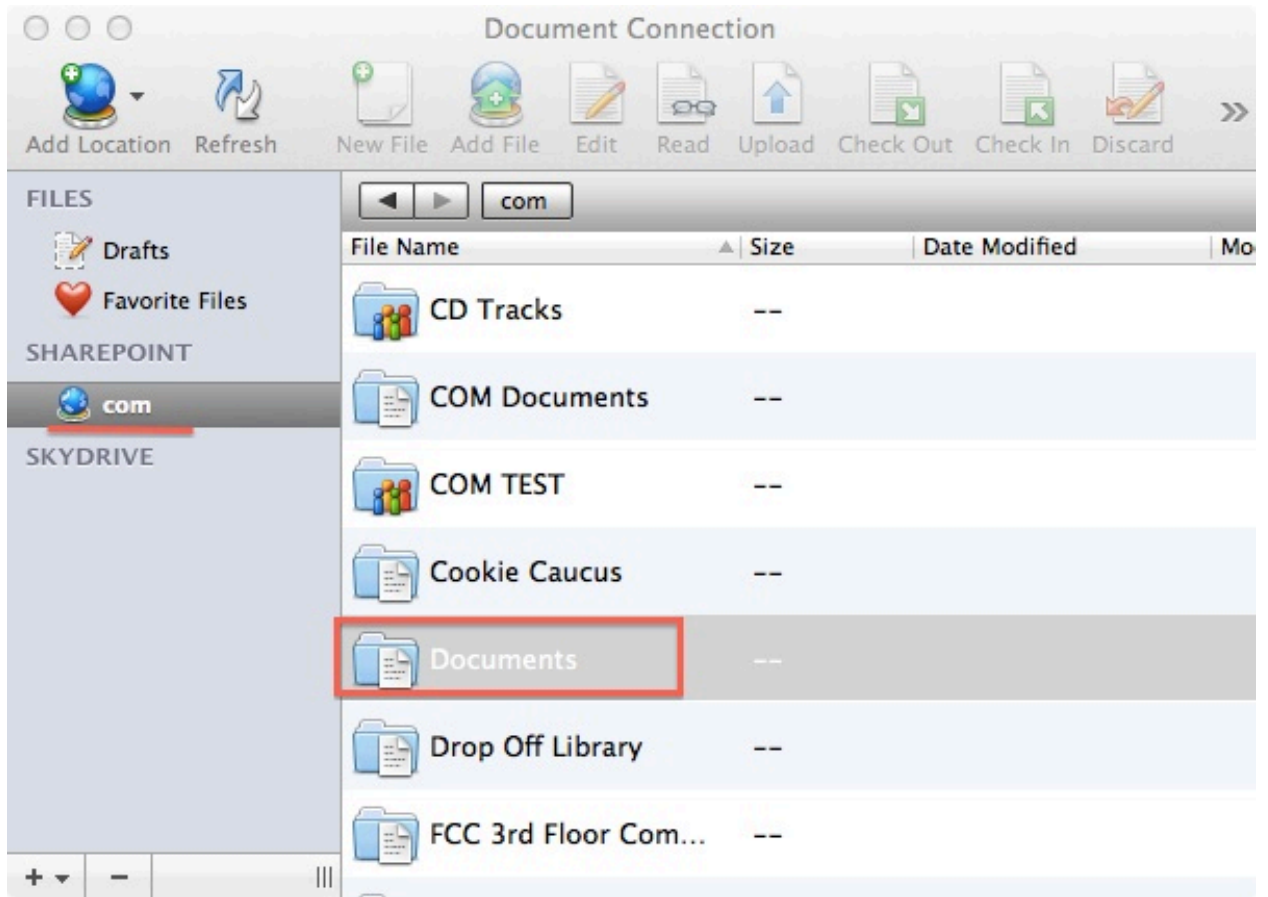
User name:

Password:

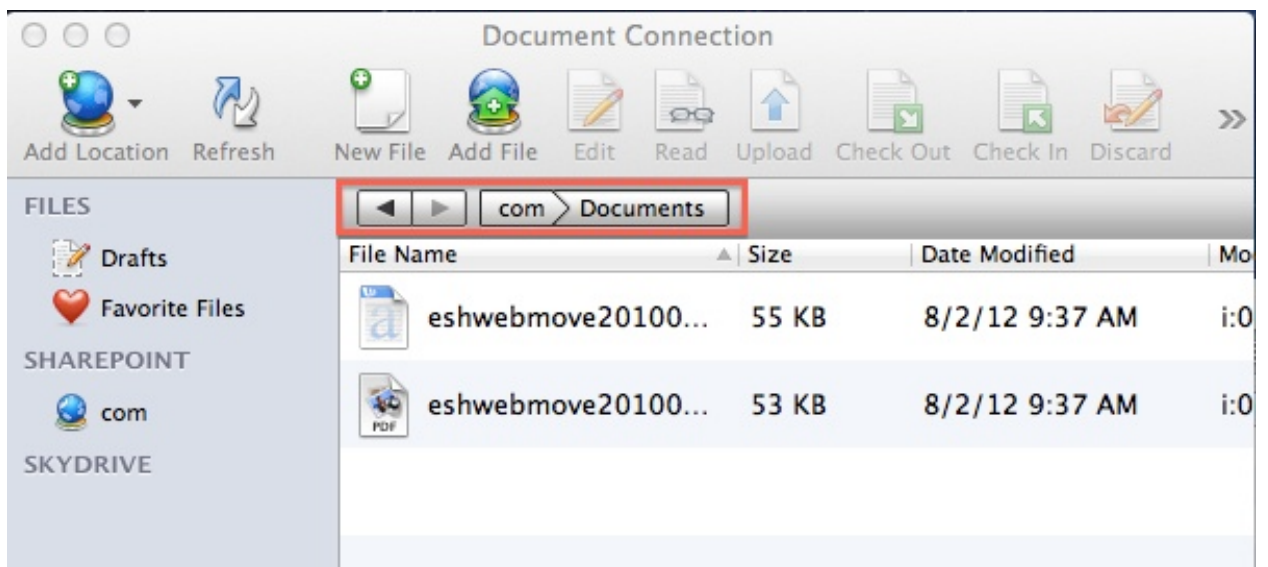
Sign In

Using Document Connection

A Document Connection window listing of your SharePoint site will come up once you have connected and signed in. Your Document Connection window can now be used to access SharePoint as if it were a folder on your Mac. You can browse to the needed location and drag-and-drop multiple files (but not folders) to upload and download files between your Mac and SharePoint. Also, the location you added should show up under the list of SharePoint locations so you can just click on that the next time you want to connect to that same location.



You can use the breadcrumbs (directory hierarchy listing) and right and left arrows to navigate and go forward and back in the Document Connection SharePoint listing window.



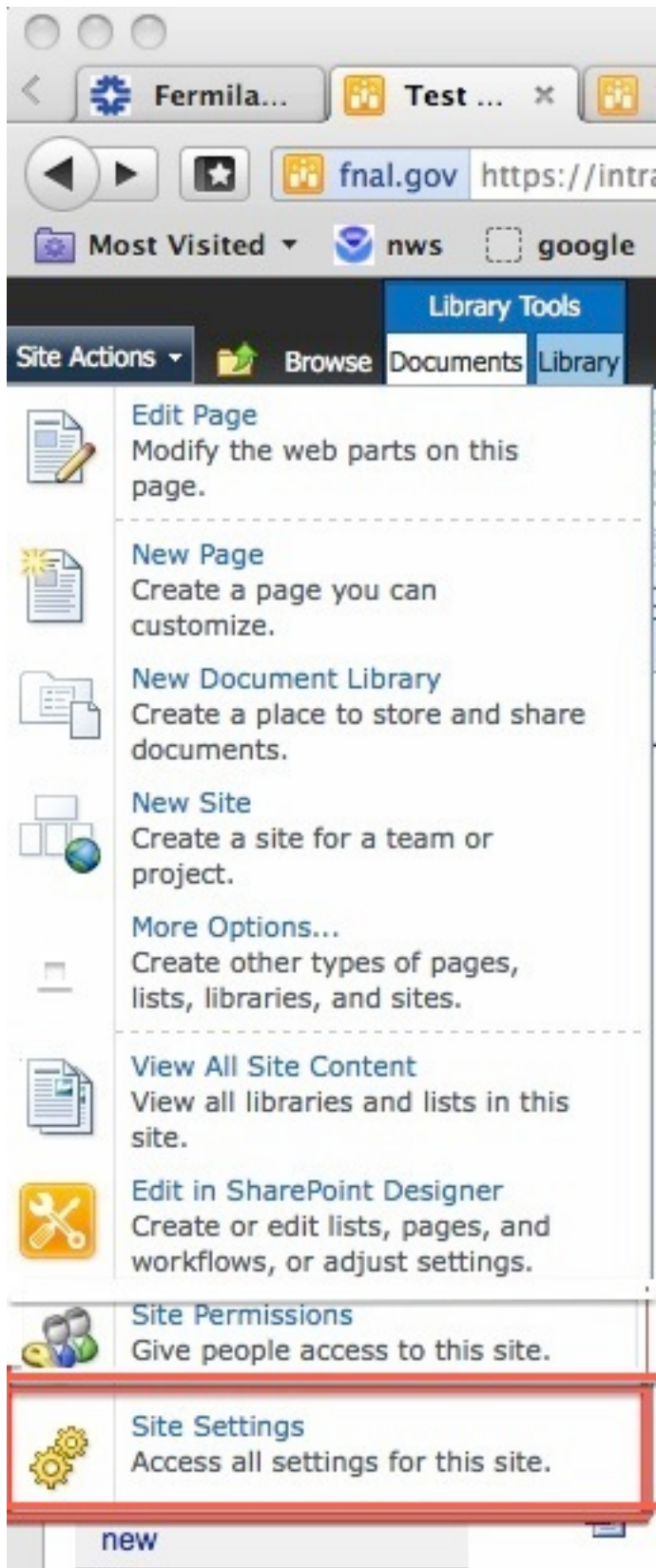
For more information about using Document Connection, see:

<http://www.mactech.com/articles/mactech/Vol.25/25.07/NewToolsforCollaboration-IntroDocumentConnection/>

Moving Multiple Files or List Items

Use these instructions if you want to move multiple files or list items in SharePoint from a Mac. SharePoint's "Content and Structure" settings allow this to be done and have an advantage that the original meta-data such as author and date are retained.

1. From the **Site Actions** menu, choose **Site Settings**.



2. From the **Site Settings** list, click on Content and **Structure**.

COM group sandbox ▸ Site Settings



Users and Permissions

People and groups
Site permissions



Galleries

Site columns
Site content types
Web parts
List templates
Master pages
Themes
Solutions



Site Administration

Regional settings
Site libraries and lists
User alerts
RSS
Search and offline availability
Sites and workspaces
Workflow settings
Related Links scope settings
Term store management
Content and structure
Searchable columns

3. Navigate to the desired site and library or list in the left column. Check the boxes of the items you want to move in the right column.

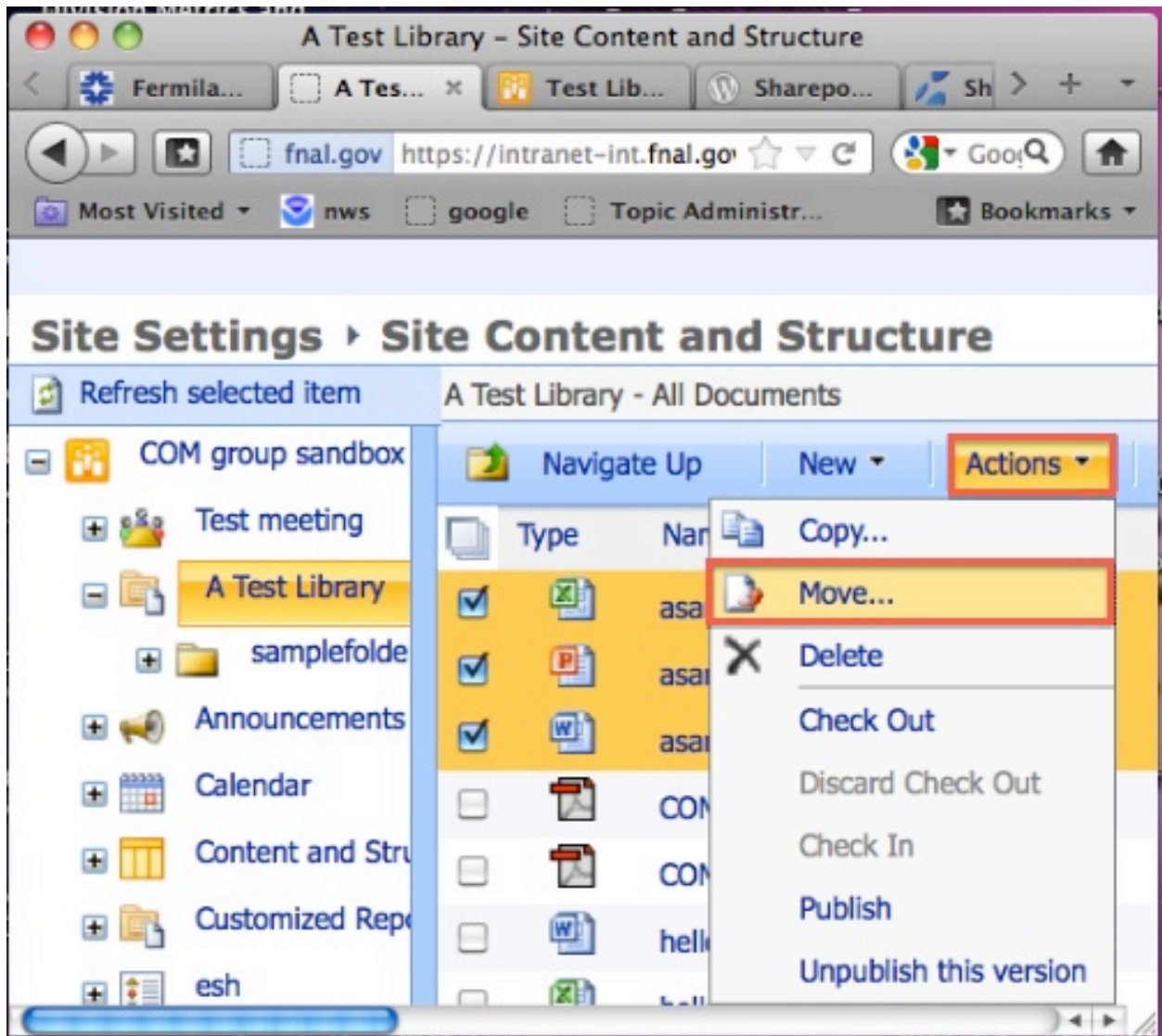
The screenshot shows a web browser window titled "A Test Library - Site Content and Structure". The address bar shows the URL "https://intranet-int.fnal.gov/sanc". The page content is divided into two main sections: "Site Settings" on the left and "Site Content and Structure" on the right.

Site Settings: This section contains a list of site settings. The "COM group sandbox" and "A Test Library" are highlighted with red boxes. Other settings include "Test meeting", "asamplefolder", "Announcements", "Calendar", "Content and Structure", and "Customized Reports".

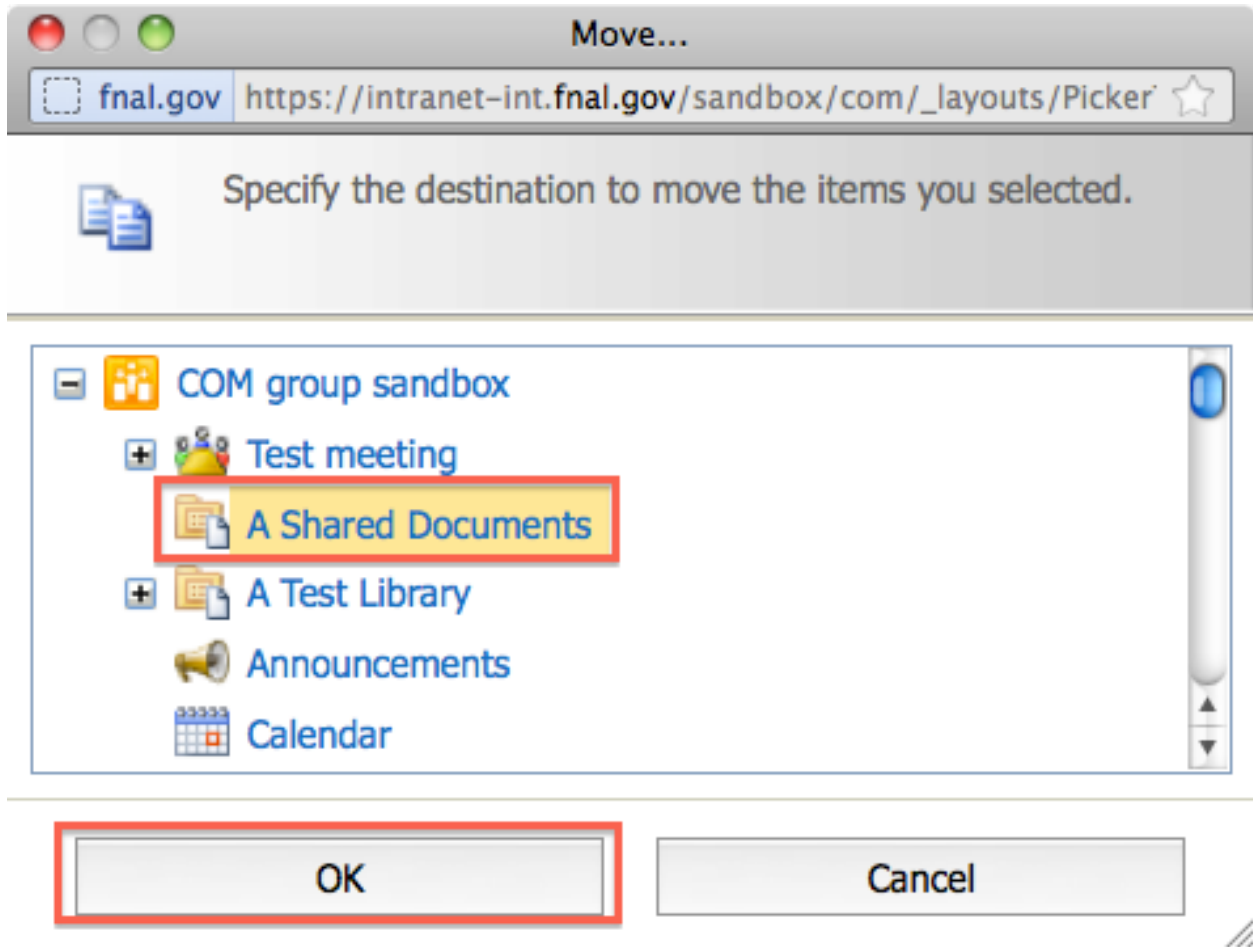
Site Content and Structure: This section displays a list of documents under the heading "A Test Library - All Documents". The list has columns for "Type" and "Name". The first four items are highlighted with an orange box:

Type	Name
<input checked="" type="checkbox"/>	asampleexcelfile
<input type="checkbox"/>	asamplefolder
<input checked="" type="checkbox"/>	asamplepowerpoint.ppt
<input checked="" type="checkbox"/>	asampleworddoc
<input type="checkbox"/>	COM Ops ReportApril_30_2012
<input type="checkbox"/>	COM Ops ReportMay21_2012

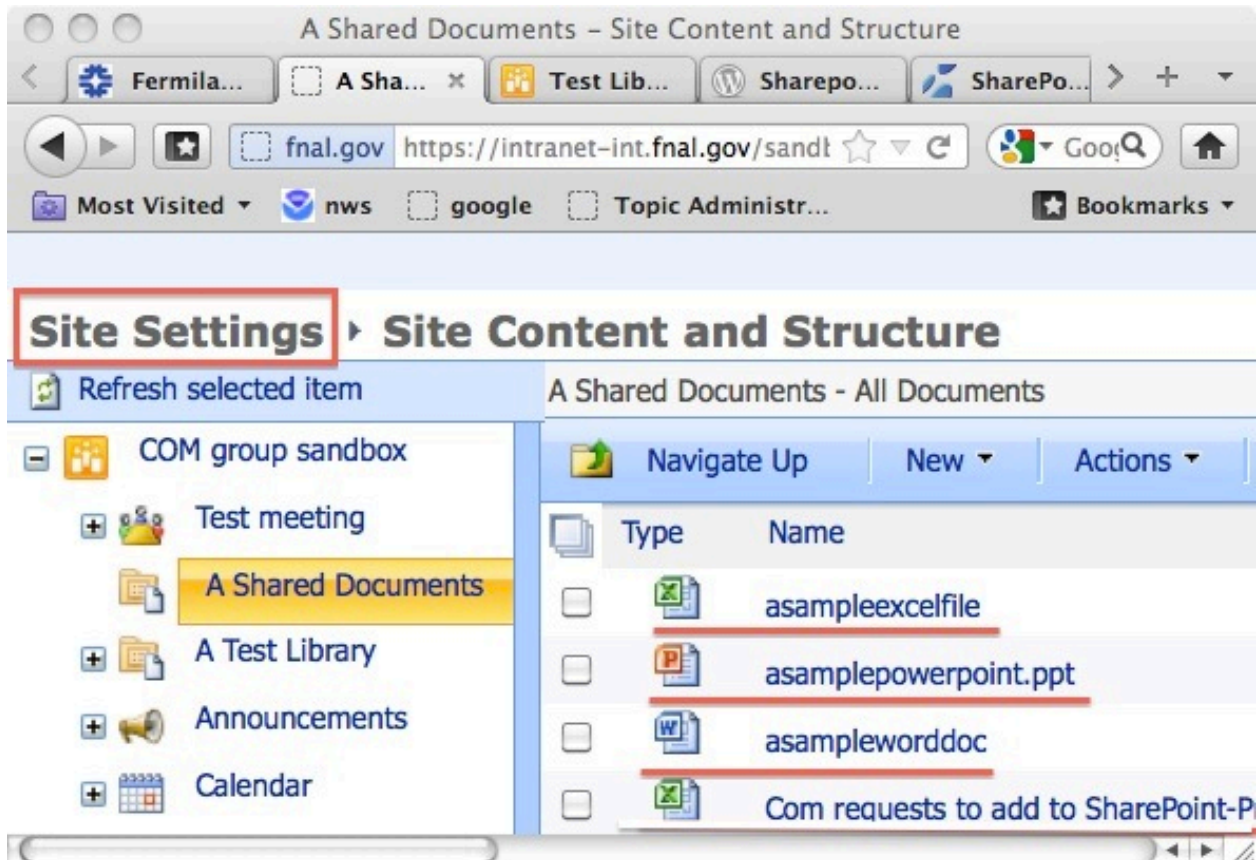
4. From the **Actions** menu, select **Move**.



5. In the **Move** dialog box that pops up, select the desired destination library or list for the items you are moving and then click on **OK**.



6. Your window should not show your destination list or library with the items you have added. Use the **Site Settings** navigation link to get back to your Site Settings page and then back to your site from there.



Moving a Whole List or Library

Use these instructions if you want to move a whole list or library from one SharePoint location to another.

The Microsoft procedure to copy or move a list by using a list template is at

<http://office.microsoft.com/en-us/office365-SharePoint-online-enterprise-help/copy-or-move-a-list-by-using-a-list-template-HA101969181.aspx>

This procedure includes steps to:

1. Create a list template.
2. Edit the list template properties.
3. Copy or move a list within a site collection.
4. Delete a list template

A similar procedure is available for moving a whole library at:

<http://office.microsoft.com/en-us/office365-SharePoint-online-enterprise-help/copy-or-move-a-library-by-using-a-library-template-HA101969179.aspx>

Moving Web Parts in a Web Part Page

Use these instructions if you need to move a web part to a different location in a web part page. Note that this procedure is not needed if you want to move items around in a Wiki page – This can be done via drag-and-drop.

1. Navigate to the web part page you wish to edit. Notice in this example page that the Announcements web part is above the Welcome text. In this example, we will go through the steps to put it below the Welcome text.

The screenshot shows a web browser window with the address bar displaying <https://sharepoint.fnal.gov/cd/sites/com/SiteAssets/comtes>. The page has a yellow warning bar at the top stating "This page asks to use a plugin that can only run in 32-bit mode" with a "Restart in 32-bit mode" button. Below the warning bar is a navigation bar with "Site Actions" and "Browse" buttons. The main content area is titled "Communications" and features a "comtest" dropdown menu. Under "comtest", there is a "COM Announcements" section with a table of announcements. The table has columns for "Title" and "Modified". The first announcement is "Meeting next week" with a "NEW" tag, modified on "8/2/2012 11:25 AM". Below the table is a link to "Add new announcement". The page also includes a "Content Editor" section with the text "Welcome To The COM Home Page". The footer contains the text: "Fermi National Accelerator Laboratory | Office of Science / U.S. Department of Energy | Managed by Fermi Research Alliance, LLC | Security, Privacy, Legal".

comtest

https://sharepoint.fnal.gov/cd/sites/com/SiteAssets/comtes

This page asks to use a plugin that can only run in 32-bit mode Restart in 32-bit mode

Site Actions Browse Page Item List

Fermilab U.S. DEPARTMENT OF ENERGY

Communications SuperComputing Sector Newsletter SharePoint COM project

Communications

comtest

COM Announcements

Title	Modified
Meeting next week NEW	8/2/2012 11:25 AM

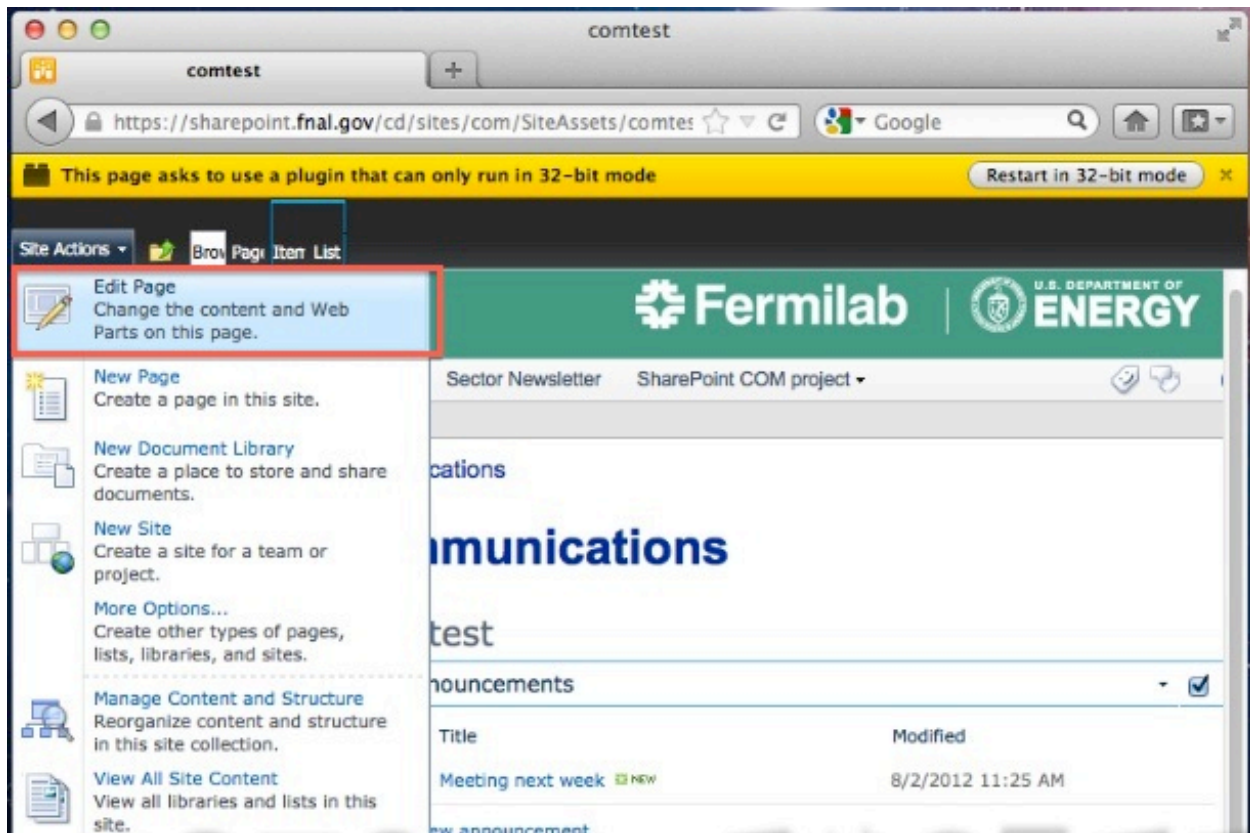
Add new announcement

Content Editor

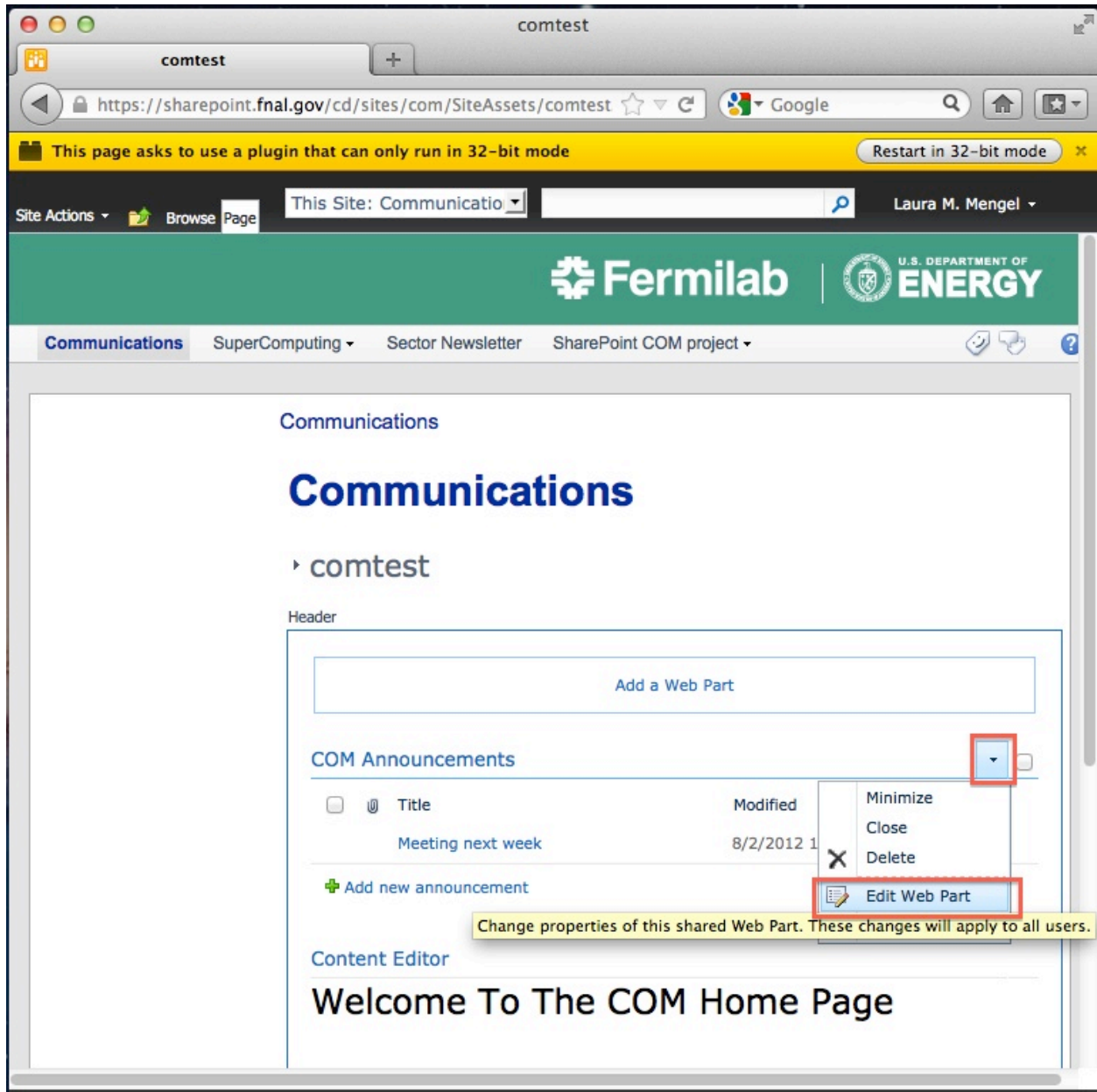
Welcome To The COM Home Page

Fermi National Accelerator Laboratory | Office of Science / U.S. Department of Energy | Managed by Fermi Research Alliance, LLC | Security, Privacy, Legal

2. From the **Site Actions** menu, select **Edit Page**.



- On the web part you want to move, hover over its' title (such as "Com Announcement") and a triangle menu icon will appear on the right hand side. Click on the triangle and select Edit Web Part from the menu.



4. A Web Part Editor will appear in the right column. Click on the + sign to the left of the **Layout** section to expand the layout section.

Communications

▸ comtest

Header

[Add a Web Part](#)

COM Announcements ▾ ✓

<input type="checkbox"/>		Title	Modified
		Meeting next week <small>NEW</small>	8/2/2012 11:25 AM

[+ Add new announcement](#)

Content Editor

Welcome To The
COM Home Page

COM Announcements ✕

List Views

You can edit the current view or select another view.

Selected View
<Current view> ▾
[Edit the current view](#)

Toolbar Type
Summary Toolbar ▾

+ Appearance

+ Layout

+ Advanced

+ AJAX Options

+ Miscellaneous

OK

Cancel

Apply

5. The **Layout** section will expand to show all the layout options.

The screenshot displays the SharePoint web part configuration interface. On the left, the 'Header' section contains an 'Add a Web Part' button, a 'COM Announcements' web part with a table of announcements, and a 'Content Editor' web part with the text 'Welcome To The COM Home Page'. Below these are three columns labeled 'Left Column', 'Middle Column', and 'Right Column', each with an 'Add a Web Part' button. At the bottom is a 'Footer' section. On the right, the configuration pane is open, showing the 'List Views' section with options to edit the current view or select another. Below this, the 'Layout' section is expanded, showing options for 'Hidden' (unchecked), 'Direction' (set to 'None'), 'Zone' (set to 'Header'), and 'Zone Index' (set to '1'). Further down are sections for 'Advanced', 'AJAX Options', and 'Miscellaneous'. At the bottom of the configuration pane are 'OK', 'Cancel', and 'Apply' buttons.

Header

Add a Web Part

COM Announcements

<input type="checkbox"/>		Title	Modified
		Meeting next week	8/2/2012 11:25 AM

+ Add new announcement

Content Editor

Welcome To The COM Home Page

Left Column

Add a Web Part

Middle Column

Add a Web Part

Right Column

Add a Web Part

Footer

List Views

You can edit the current view or select another view.

Selected View

<Current view>

Edit the current view

Toolbar Type

Summary Toolbar

+ Appearance

- Layout

☐ Hidden

Direction

None

Zone

Header

Zone Index

1

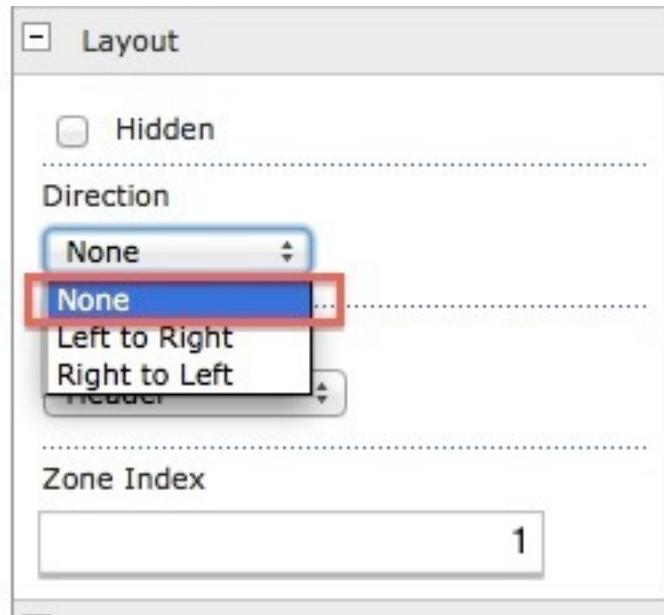
+ Advanced

+ AJAX Options

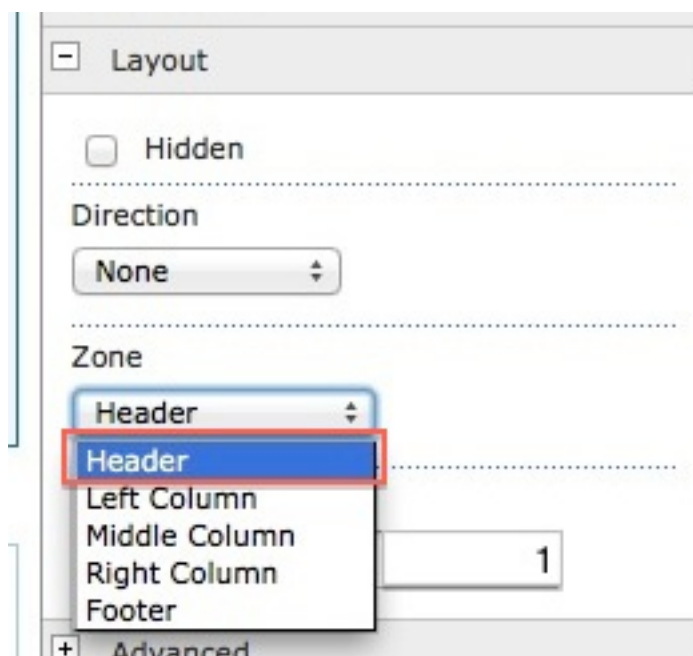
+ Miscellaneous

OK Cancel Apply

6. Select **None** from the Direction menu if it is not already selected. (Or you can choose to lay items out **Left to Right** or **Right to Left** if you have a number of web parts in a row).



7. Select the correct **Zone** where you want the web part to be moved. In this case, we are keeping the Announcements web part in the same **Header** Zone, but just changing its' position in that zone to move it lower. The zones are the container areas for web parts in the page such as header, footer, and different columns on the page. Your page may be laid out differently.



8. Next change the **Zone Index** (relative order) of the web part to the desired location and then click **Apply**. In this case, the Zone Index was 1 and we want to move it after the Content Editor “Welcome” part that had a Zone Index of 2, so we want to change the Announcements web part Zone Index to 3 so the Announcements will be moved under the Welcome (as it is below).

The screenshot displays the SharePoint web part configuration interface. On the left, the 'Header' zone is visible, containing a 'Content Editor' web part with the text 'Welcome To The COM Home Page' and a 'COM Announcements' web part. The 'COM Announcements' web part is currently selected. Below the 'Header' zone, the 'Left Column', 'Middle Column', and 'Right Column' zones are shown, each containing an 'Add a Web Part' button. On the right, the 'List Views' configuration pane is open. It shows the 'Selected View' as '<Current view>' and the 'Toolbar Type' as 'Summary Toolbar'. The 'Zone' is set to 'Header'. The 'Zone Index' is set to 3, which is highlighted with a red box. The 'Apply' button is also highlighted with a red box.

Header

Add a Web Part

Content Editor

Welcome To The COM Home Page

COM Announcements

Title	Modified
Meeting next week	8/2/2012 11:25 AM

+ Add new announcement

Left Column Middle Column Right Column

Add a Web Part Add a Web Part Add a Web Part

Footer

List Views

You can edit the current view or select another view.

Selected View

<Current view>

Edit the current view

Toolbar Type

Summary Toolbar

+ Appearance

- Layout

☐ Hidden

Direction

None

Zone

Header

Zone Index

3

+ Advanced

+ AJAX Options

+ Miscellaneous

OK Cancel Apply